




# Are You An Authorized IRS *e-file* Provider?

*June 28, 2005*



# Why Become An Authorized IRS *e-file* Provider?

- Meet the expectations of your clients
- Get good return on your investment
- Make your own life simpler
- Interact electronically with IRS

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# Who Can Become An Authorized IRS *e-file* Provider

- Any business or organization
- Individuals are Principals and Responsible Officials
- Eligibility Requirements
- Read IRS *e-file* publications

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# Register for e-services

- Need personal information
- Create e-services User Name, Password, and PIN
- Receive Confirmation Code from IRS via U.S. mail
- Confirm Registration

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# Tips for Registering for e-services

- TIN is either SSN or ITIN
- User Name is 8 - 10 characters
- Password is at least 8 characters with at least 1 letter and 1 number
- PIN is five numbers
- Question to Recover User Name is selected from a drop down menu.

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# Become An Authorized IRS *e-file* Provider in 3 Easy Steps

- Choose Provider Option(s)  
ERO, RA, Intermediate Service Provider, Transmitter,  
or Software Developer
- Complete and Submit an IRS *e-file* Application
- Pass a Suitability Check

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# Making Changes to Your IRS *e-file* Application

- Within 30 days of change
- Principals, Responsible Officials, addresses, phone and fax numbers, contact persons, email addresses, form types, and Provider Options
- Always Save
- Sometimes Submit

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# Tips for Using the IRS *e-file* Application

- Type in names and addresses carefully using upper and lower case letters
- Ensure each Principal and Responsible Official has registered for e-services
- Enter both Delegated User and related authorities
- Read all Pop Up messages carefully

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# Delegated User and Authorities

- An individual authorized to use one or more of the e-services products
- View, update, sign and submit IRS *e-file* applications
- Access e-services incentive products
- Does not have to pass suitability

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# Tips for Passing Suitability

- Anticipate/avoid issues
- Correct before problem
- Update addresses and telephone numbers
- Respond timely in writing to letters
- Provide complete explanations and documentation

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# Tips for Monitoring Visits

- Adhere to *e-file* rules and statutory requirements
- Update addresses and telephone numbers
- Cooperate with the IRS personnel
- Respond timely and in writing
- Provide complete explanations and documentation

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# Use All Available Resources

- Publication 3112, IRS *e-file* Application and Participation
- IRS web site at [www.irs.gov](http://www.irs.gov)
- Tutorials and Help in the IRS *e-file* Application
- e-Help at 866-255-0654
- Visit the e-IRS Room

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